

CURRENT PERIOD CREW TIMESHEET (CREW)

ADVANTAGE Desktop - 0A134

File Edit Display Process Window Help

Batch: Document: CREW 580 30231700273

Date: 09 / 05 / 00 Pay Location: TAA9T0

Event View Overrides View Cost Accounting View

Name	ALLISON, STEVE	Work Schedule	8.00
Employee ID / Appt ID	060 - 10 - 0001 / <input type="checkbox"/>	Event Type	ADDHR
		Input Amount	1.00
Name	GARDENER, STANLEY	Work Schedule	8.00
Employee ID / Appt ID	060 - 10 - 0041 / <input type="checkbox"/>	Event Type	AL
		Input Amount	1.00
Name	GRAHAM, ALEXANDER	Work Schedule	8.00
Employee ID / Appt ID	060 - 10 - 0021 / <input type="checkbox"/>	Event Type	ADDHR
		Input Amount	1.00
Name	HENDRICKS, JOEY	Work Schedule	8.00
Employee ID / Appt ID	060 - 10 - 0061 / <input type="checkbox"/>	Event Type	ADDHR
		Input Amount	1.00
Name	ROGERS, JOY	Work Schedule	8.00
Employee ID / Appt ID	060 - 10 - 0011 / <input type="checkbox"/>	Event Type	ADDHR
		Input Amount	1.00

Messages Status: HELD Ln 2/6 9:50 AM 07/05/00



NOTES



CURRENT PERIOD CREW TIMESHEET (CREW)

Access the Current Period Crew Timesheet (CREW) window using one of the methods just described.

The Current Period Crew Timesheet (CREW) allows time entry for all the employees within a respective pay location, as well as overrides at the employee level.

The CREW document is generated with a line for each crewmember for the event date.

For all employees who work in the crew, the crew supervisor or clerk enters all regular time worked, as well as any leave events or overtime hours, etc.

Step 1 Verify information in the header of the CREW.

DATE – Inferred. The Event Date entered on CRGN is displayed in this field.

PAY LOCATION – Inferred. The Pay Location entered on CRGN is displayed in this field.

EVENT VIEW

Step 2 Verify information in the Event View panel of the CREW. If necessary, add or delete lines.

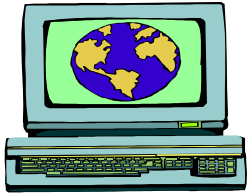
NAME – Inferred. The employee's full name (last name, first name, and middle initial) is displayed.

WORK SCHEDULE – Inferred. The employee's scheduled work hours for the Event Date are displayed based on the information specified on the Pay Class (PYCL) window and the Work Day Schedule (WDAY) window for the employee.

EMPLOYEE ID – Inferred. The employee's identification (SSN) number is displayed.

APPT ID – Inferred. The employee's Appointment ID is displayed, if applicable.

EVENT TYPE – Inferred. This field is populated with the default Event Type specified on CRGN. This value can be overridden on any of the document detail lines. Type **AL** in this field on the line for the employee who took the four hours off (overtime *ADDHR*).



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Date 09 / 05 / 00 Pay Location TAA9T0

Event View Overrides View Cost Accounting View

Name	ALLISON, STEVE	Work Schedule	8.00
Employee ID / Appt ID	060 - 10 - 0001 / <input type="checkbox"/>	Event Type	ADDHR
		Input Amount	1.00
Name	GARDENER, STANLEY	Work Schedule	8.00
Employee ID / Appt ID	060 - 10 - 0041 / <input type="checkbox"/>	Event Type	AL
		Input Amount	4
Name	GRAHAM, ALEXANDER	Work Schedule	8.00
Employee ID / Appt ID	060 - 10 - 0021 / <input type="checkbox"/>	Event Type	ADDHR
		Input Amount	1.00
Name	HENDRICKS, JOEY	Work Schedule	8.00
Employee ID / Appt ID	060 - 10 - 0061 / <input type="checkbox"/>	Event Type	ADDHR
		Input Amount	1.00
Name	ROGERS, JOY	Work Schedule	8.00
Employee ID / Appt ID	060 - 10 - 0011 / <input type="checkbox"/>	Event Type	ADDHR
		Input Amount	1.00

Messages Status: HELD Ln 2/6 9:52 AM 07/05/00



NOTES



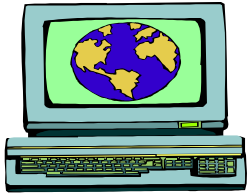
CURRENT PERIOD CREW TIMESHEET (CREW)

If the leave request edit feature is utilized by a particular agency and an employee has requested leave through a LREQ for the day specified on CRGN, the Leave Type code requested will be generated in this field. For partial day leave requests, two lines will be generated for the Event Date: one for the leave Event Type and one for the Event Type specified on the CRGN. For example, if an employee requested 3 hours of leave and the employee is scheduled to work 8 hours, two lines will be generated. One line will indicate the leave Event Type code and a second line will indicate the employee's default Event Type code from the CRGN entry.

When this field is entered or changed, the Event Type entered must be used on a valid day, depending on the employee's work schedule. For example, "Emergency On Call" pay may only be used when an employee is called in to work on an off day. Therefore, it cannot fall on a scheduled workday. If the Event Type does not fall on an appropriate day, either a warning message or an error will be generated when the user tries to update the CREW entry. If it generates a warning message for informational purposes, the user will be able to update the CREW. However, if the entry generates an error message, the user will be unable to update the CREW without first rectifying the situation.

INPUT AMOUNT – Required. This field is populated with the default Input Amount specified on CRGN. If the entered input amount is in time, the entry must be in hours and minutes. All input amounts must be in increments of 15 minutes (for example, 1.15 for 1¼ hour; 1.30 for 1½ hour; and 1.45 for 1¾ hour—a value of 1.20 or 1.43 is not valid). Type **4** in this field on the line for the employee who took the 4 hours off (overtime *1.00*).

If the leave request edit feature is utilized by an agency and an employee has requested leave through a LREQ document for the day specified on CRGN, the hours of leave requested will be generated in this field. For partial day leave request, two lines will be generated: one for the leave event and one for the regular event. For example, if an employee requested 3 hours of leave and the employee is scheduled to work 8 hours, two lines will be generated. One line will indicate the 3 hours of leave requested and the second line will indicate the remaining 5 hours of regular time.



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File Edit Display Process Window Help

Batch: Document: CREW 580 30231700273

Date 09 / 05 / 00 Pay Location TAA9T0

Event View Overrides View Cost Accounting View

Name	GARDENER, STANLEY		<input type="checkbox"/> Reduce Base Pay Type
Employee ID / Appt ID	060 - 10 - 0041	/	Work Schedule 8.00
Event Type	AL		Input Amount 1.00
Accounting Overrides			
Labor Distribution Profile		Distribution Option	Employee Assignment
Fund		Agency	
Organization / Sub		Appr Unit	
Activity		Function	
Object / Sub		Job Number	
Report Category			

Messages Status: HELD Ln 2/6 9:53 AM 07/05/00



NOTES



CURRENT PERIOD CREW TIMESHEET (CREW)

The Employee ID, Appt ID, Event Type, and Input Amount fields may be modified (changing hours, etc.) for any document line. Lines may be deleted by selecting the menu Edit and the option Remove Line, or inserted by selecting the menu Edit and the option Insert Line After/Before. Any Employee ID that is entered or changed must represent an employee who resides within the given Pay Location. If an Employee ID that is not a member of the Pay Location is entered, an error message will be issued when the user tries to update the CREW entry.

OVERRIDES VIEW

Step 3 Verify the Overrides View Panel of the CREW. If the employee's accounting information is being overridden, the fields on this panel must be populated.

Fields from the Event View Panel are also displayed on this panel. Any changes to these fields in the Overrides View Panel will also appear in the Event View Panel.

REDUCE BASE PAY TYPE – For exception-paid employees the checkbox **must** be selected when the Event Type is “REGLR” (Regular Pay Event) so that the pay from hours charged to this event is counted against the system-generated base pay amount. Otherwise this pay will be considered in addition to the exception base pay. For positive-paid employees, the Reduce Base Pay Type checkbox should never be selected.

DISTRIBUTION OPTION – Select “Employee Assignment” to use the default labor distribution attributes. Any information entered in the accounting fields when this Distribution Option is selected will result in an error when the user tries to edit the CREW. Select “Entered Profile” to use an override labor distribution profile. Select “Entered Acctg Values” to override the default accounting attributes. If “Entered Accounting Values” is used, one slash (/) needs to be entered in any fields where the default will be used, and override values in the rest. Enter the accounting distribution codes. Select “Position Assignment” to use the accounting attributes assigned to the employee's position.

Note: If “Entered Acctg Values” was used on CRGN, the accounting fields (with the exception of Activity, Function, Job Number, and Report Category) will be defaulted to slashes automatically.



CURRENT PERIOD CREW TIMESHEET (CREW)

ADVANTAGE Desktop - DA134

File Edit Display Process Window Help

Batch: Document: CREW 580 30231700273

Date 09 / 05 / 00 Pay Location TAA9T0

Event View Overrides View Cost Accounting View

Name	GARDENER, STANLEY		<input type="checkbox"/> Reduce Base Pay Type
Employee ID / Appt ID	060 - 10 - 0041	/	Work Schedule 8.00
Event Type	AL		Input Amount 1.00
Accounting Overrides			
Labor Distribution Profile			Distribution Option Employee Assignment
Fund			Agency
Organization / Sub		/	Appr Unit
Activity			Function
Object / Sub		/	Job Number
Report Category			

Messages Status: HELD Ln 2/6 9:53 AM 07/05/00



NOTES



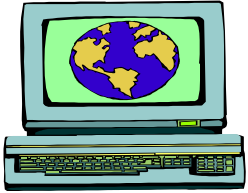
CURRENT PERIOD CREW TIMESHEET (CREW)

LABOR DISTRIBUTION PROFILE – If “Entered Profile” is selected as the Distribution Option, enter the appropriate profile. If a Labor Distribution Profile code is entered and any of the following fields are populated: Activity, Function, Job Number or Reporting Category, then the corresponding code for the Labor Distribution Profile code on the Labor Distribution Profile Table (LDPR) will be overwritten for this document entry. If this field on the LDPR entry is not blank, a warning message will be issued, but the field will still be overwritten. For example, if an Activity code is entered on the document and the corresponding field on the LDPR entry is not blank, the Activity field for the specific Labor Distribution Profile code on LDPR will be overwritten and a warning message will be issued when the user updates the CREW entry. If the Activity field for the specific Labor Distribution Profile code on LDPR is blank, no warning message will be issued.

FUND - Conditional. This is required if Entered Accounting Values is selected in the Distribution Option field. Enter the fund to which the specified percentage is to be charged, or leave the default slash (/) in the field. Valid values are located on the Fund (FUND) window.

AGENCY - Conditional. This is required if Entered Accounting Values is selected in the Distribution Option field. Enter the agency to which the specified percentage is to be charged, or leave the default slash (/) in the field. Agency must be valid with the entered fund. See Fund Agency Index (FAGY) for valid fund and agency combinations.

ORGANIZATION - Conditional. This is required if Entered Accounting Values is selected in the Distribution Option field. Enter the organization to which the specified percentage is to be charged, or leave the default slash (/) in the field. Valid values are located on the Organization Index (ORGN) window.



CURRENT PERIOD CREW TIMESHEET (CREW)

ADVANTAGE Desktop - 0A134

File Edit Display Process Window Help

Batch: Document: CREW 580 30231700273

Date 09 / 05 / 00 Pay Location TAA9T0

Event View Overrides View Cost Accounting View

Name GARDENER, STANLEY ☐ Reduce Base Pay Type

Employee ID / Appt ID 060 - 10 - 0041 / ☐ Work Schedule 8.00

Event Type AL Input Amount 1.00

Accounting Overrides

Labor Distribution Profile		Distribution Option	Employee Assignment
Fund		Agency	
Organization / Sub	/	Appr Unit	
Activity		Function	
Object / Sub	/	Job Number	
Report Category			

Messages Status: HELD Ln 2/6 9:53 AM 07/05/00



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CURRENT PERIOD CREW TIMESHEET (CREW)

SUB-ORG - Conditional. This may be required if Entered Accounting Values is selected in the Distribution Option field. Enter a sub-organization, or leave the default slash (/) in the field. Valid values are located on the Sub-Organization (SORG) window.

APPR UNIT - Conditional. This is required if Entered Accounting Values is selected in the Distribution Option field. Enter the appropriation unit code to which the employee reports, or leave the default slash (/) in the field. Valid values are located on the Appropriation Index (APPR) window.

ACTIVITY - Conditional. This may be required if Entered Accounting Values is selected in the Distribution Option field. Enter the activity code to which the specified percentage is to be charged. Valid values are located on the Activity Index (ACTV) window.

FUNCTION - Conditional. This may be required if Entered Accounting Values is selected in the Distribution Option field. Enter the function code representing the budget for the group-related activity. Valid values are located on the Function (FUNC) window.

OBJECT - Conditional. This is required if Entered Accounting Values is selected in the Distribution Option field. Enter the object to which the specified percentage is to be charged, or leave the default slash (/) in the field. Valid values are located on the Object (OBJT) window.

SUB-OBJECT - Conditional. This may be required if Entered Accounting Values is selected in the Distribution Option field. Enter the sub-object if a further breakdown of object is employed, or leave the default slash (/) in the field. Valid values are located on the Sub-Object (SOBJ) window.

JOB NUMBER - Conditional. This may be required if Entered Accounting Values is selected in the Distribution Option field. Enter the job code used to track specific costs associated with particular projects or jobs. Valid values are located on the Job Index (JOBT) window.

REPORT CATEGORY - Conditional. This may be required if Entered Accounting Values is selected in the Distribution Option field. Enter the report category. Valid values are located on the Reporting Category (RPTG) window.



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File Edit Display Process Window Help

Batch: Document: CREW 580 30231700273

Date: 09 / 05 / 00 Pay Location: TAA9T0

Event View Overrides View Cost Accounting View

Name	GARDENER, STANLEY			Activity		Function	
Event Type	AL	Input Amount	4	Report Category		Job Number	
Name	GRAHAM, ALEXANDER			Activity		Function	
Event Type	ADDHR	Input Amount	1.00	Report Category		Job Number	
Name	HENDRICKS, JOEY			Activity		Function	
Event Type	ADDHR	Input Amount	1.00	Report Category		Job Number	
Name	ROGERS, JOY			Activity		Function	
Event Type	ADDHR	Input Amount	1.00	Report Category		Job Number	
Name	WALLACE, JOSEPH			Activity		Function	
Event Type	ADDHR	Input Amount	1.00	Report Category		Job Number	

Messages Status: HELD Ln 2/6 9:57 AM 07/05/00



NOTES



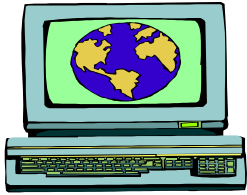
CURRENT PERIOD CREW TIMESHEET (CREW)

COST ACCOUNTING VIEW

Step 4 Verify the Cost Accounting View panel of the CREW. If the employee's cost accounting information is being overridden, the fields on this panel must be populated.

Fields from the Event View and Overrides View panels are also displayed on this panel. Any changes to these fields in the Cost Accounting View panel will also appear in the Event View panel.

All of the fields on the Cost Accounting View panel appear on the Overrides View panel as well. The Cost Accounting View panel provides a simpler view of each line on the CREW, with only basic employee information and cost accounting fields. This allows the screen to display multiple lines at one time. Depending on what needs to be changed on the CREW document, it may be easier to use the Cost Accounting View panel than the Overrides View panel.



Time & Leave

CURRENT PERIOD CREW TIMESHEET (CREW)

ADVANTAGE Desktop - 0A134

File Edit Display Process Window Help

Batch: Date 09 / 05 / 00

Event View

Name	Event Type	Activity	Function	Report Category	Job Number
GAR	AL				
GRΔ	ADD				
HEN	ADD				
ROG	ADD				
WALLACE, JOSEPH	ADDHR	Input Amount	1.00		

1 of 4: READY FOR APPROVAL 1 Messages Status: PEND1 Ln 2/6 10:02 AM 07/05/00



NOTES

CURRENT PERIOD CREW TIMESHEET (CREW)



You have verified information on the CREW and it is time to process and approve the document. Remember that the Process: Edit step applies edits to the timesheet information to verify the validity of the events and the employee's leave/pay policies. It also checks if the employee has sufficient leave balances to support the amounts specified. After a document is free of errors, the necessary levels of approval are applied. Your ability to apply approvals is determined by the security profile that you have been assigned. Also, remember that items will enter and leave your worklists based on what stage of the process that the document is in, what your security profile allows you to do, and your agency's workflow rules.

Now let's complete the processing of the CREW you created.

Step 1 Select Process: Edit.

If the document is free of errors, a message will appear in the yellow message bar at the bottom of the document window telling you that approvals are ready to be applied. If the document contains errors, messages will appear specifying the errors. You would need to correct the errors and repeat Step 1.

Step 2 Select Process: Approve.

The document will move to other worklists based upon the levels of approval that need to be applied and what your security profile permits.

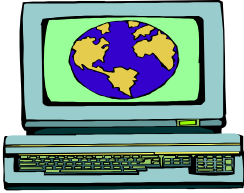
Step 3 Close the document.

For training purposes, you will stop at this point. In this class, the document is routed to the instructor's worklist. The instructor will complete the next step. However, in the "real world", the final approver will perform the following steps.

Step 4 Select Process: Approve. The document is now ready to be run.

Step 5 Select Process: Run.

After the document has been run, its status changes to "Accepted". The document will remain on the Document Listing (SUSF) table for a period of time. During this time period, accepted documents can be reviewed, but not changed.



CORRECTING ERRORS IN THE CURRENT PAY PERIOD

Crew Document Generation

Document Agency	<input type="text"/>	Document Number	<input type="text"/>
Event Date	<input type="text"/> / <input type="text"/> / <input type="text"/>	Pay Location	<input type="text"/>
Event Type	<input type="text"/>		
Input Amount	<input type="text"/>	<input type="checkbox"/> Reduce Base Type	

[Accounting Overrides](#)

Labor Distribution Profile	<input type="text"/>	Distribution Option	Employee Assignment <input type="button" value="v"/>
Fund	<input type="text"/>	Agency	<input type="text"/>
Organization / Sub	<input type="text"/> / <input type="text"/>	Appr Unit	<input type="text"/>
Activity	<input type="text"/>	Function	<input type="text"/>
Object / Sub	<input type="text"/> / <input type="text"/>	Job Number	<input type="text"/>
Report Category	<input type="text"/>		



CORRECTING ERRORS IN THE CURRENT PAY PERIOD

If errors were made on the original timesheet and the document has already been accepted by the SAM II HR/Payroll System, another timesheet must be processed in order to make modifications.

If time and attendance data reported through the group timesheet was incorrect, another CRGN and CREW can be processed to record adjustments. This method can only be used if an adjustment timesheet is made within the same pay period in which the original timesheet was entered.

The adjustment procedure is similar to the procedure for entering an original timesheet. When entering timesheet adjustments, however, entries should be made only to correct erroneous entries previously accepted by the system. For example, if an employee worked 3 hours and took 5 hours of sick leave on 07/05/00 but mistakenly reported 5 working hours and 3 sick leave hours in the original timesheet, an adjustment will need to be made in the modification timesheet as follows:

07/05/00	Regular	-2.0hours
07/05/00	Sick Leave	2.0 hours

Step 1 Access a CRGN.

Step 2 Make the necessary entries on CRGN.

Step 3 Select **Modify: Update**.

The new Current Period Crew Timesheet Document Generation (CRGN) will then generate the new Current Period Crew Timesheet (CREW) from the user-specified data.

Step 4 Access the CREW documents using one of the methods described earlier. The CREW document displays with a line for each crewmember.

Step 5 Ordinarily you would remove all unnecessary lines, and make the adjustment(s) required for the correction(s). If the differences in the leave amounts and work that the employee really did are realized in the current pay period before payroll is run, an example of the entries might be:

04/04/00	Work Hours (REGLR)	2.0 hours
04/04/00	Annual Leave (AL)	-2.0 hours

Step 6 Select **Process: Edit**.

Step 7 Send the document through the normal approval and run process.



NOTES



CORRECTING ERRORS FROM A PREVIOUS PAY PERIOD

If you were informed after payroll had been run for the current pay period that a leave event previously entered for one of your employees was entered in error, you would need to use a Prior Period Timesheet (PPER) to correct this error. Remember that at least two correcting entries on the line level will need to be made. The first entry will “undo” the incorrect entry. The second entry will establish the correct event.

HOLDING A TIMESHEET

[illegible]



HOLDING A TIMESHEET

If an agency is not prepared to 'edit' and/or 'run' a timesheet, the timesheet can be frozen, as is, to await future user action. This would be beneficial if the user was interrupted in the middle of data entry or needed to look up something before finishing data entry. The timesheet can be frozen through **Process: Hold**. This timesheet will be held for processing and must be edited, approved and run before it will be "Accepted" by the system.

Due to the timing of processing a lag payroll, there are certain periods of time that the system will not allow certain current period timesheets to be run even though we are already working in the new pay period. During the first week of the next pay period the system is still processing the prior pay period, therefore it believes the current pay period to be different than what you may be trying to enter. If a timesheet needs to be entered before the system is finished processing the prior pay period, then the timesheet can be entered, edited, and placed in HELD status. The timesheet will be held for processing at the appropriate time.

Since the CREW is a daily timesheet, the system treats it differently than a CPER, or CITS. The system will allow you to apply approvals to and run the CREW regardless of whether that pay period is being currently processed. For example, today is July 27 and the current period payroll processing is July 1-15. You may place approvals on and run the CREW document for July 27 and the system will retain the information until the July 16-31 pay period is active. The CREW does not have to be put on hold until the appropriate pay period is active.

NOTE: If a user attempts to 'Run' a timesheet that is 'Scheduled' but has not had the approvals applied, the timesheet's status will change to 'Rejected' until a user applies the edits, approves and 'runs' the timesheet, thus advancing the timesheet to 'Accepted' status and be ready to affect payroll.

However, a CREW document can still be held after editing if desired using the **Process: Hold** command.



NOTES



HOLDING A TIMESHEET

After Workflow has been initiated, the user may change the status of the document so it is not processed until further action is taken. However, the document must be closed first to initiate Workflow before the status is changed.

Step 1 If the document is not on your Worklist, locate the document using the other method described earlier.

The SUSF window is used to retrieve and process documents whose updates or deletions have been suspended (put on hold). This window is a temporary holding place for data uploaded to the database and data generated as a result of online updates.

Step 2 To change the status of the document directly in the SUSF Window, highlight the appropriate document. Select **Process: Process: Hold** from the pull-down menus. To go to the document and alter the status, double click on the document on SUSF or from your Worklist. This will open the document. Select **Process: Hold**. This will allow the document to remain in the system without being processed until the status is changed.

Note: If a document appears in the Worklist, the approver may open and review the document, and then select **Process: Approve**. This will complete the approval of the document, but it will not take it out of “HELD” status.

Once the appropriate pay period is reached and it is time to process the document, it must be again be accessed using one of the three methods described earlier.

Step 1 To change the status of the document directly in the SUSF Window, highlight the appropriate document. Select **Process: Process: Run** (process online) or **Process: Process: Schedule** (process offline) from the pull-down menus. To go to the document and alter the status, double click on the document listing on SUSF. This will open the document. Select **Process: Run** or **Process: Schedule**.



TESTING YOUR KNOWLEDGE

1. How would your CREW document be affected if one of the individuals on the work crew was not associated with a pay location on his/her AGYS?
2. Are approvals applied to the CRGN, or to the CREW, or to both?
3. What would happen if you applied accounting overrides to both the CRGN AND the CREW?
4. What happens to the information on the CREW after it has been Edited, Run, and Approved through the Workflow process?
- .



EXERCISE

A crew for your agency worked their regularly scheduled 8 hour day. This crew is comprised of positive paid employees.

The crew worked on a different job on this day. You will need to change the accounting distribution for the job number.

Create a CREW to pay these people for today's work.

Information such as Agency, Organization, Event Date, and Job Number will be given to you on your student card.



NOTES